

Guide for Education Planning and Results Reporting

Requirements for Alberta school jurisdictions (public, separate and Francophone school authorities) and their schools

March 2007

Guide for Education Planning 2007-2010 and Results Reporting November 2007[®]

Requirements for Alberta school boards and francophone school authorities and their schools.

This document provides the requirements for:

- Jurisdiction and school three-year education plans for 2007-2010. These plans cover the 2007/08, 2008/09 and 2009/10 school years. The due date for jurisdictions has been extended to June 22, 2007.
- Jurisdiction and school Annual Education Results Reports on the 2006/07 school year, based on the three-year education plans for 2006-2009. Jurisdiction reports are due on November 30, 2007.

For more information or for additional copies of this document, contact:

Sharon Campbell, Executive Director
Performance Measurement and Reporting
Alberta Education
9th floor, Commerce Place, 10155-102 Street
Edmonton, Alberta T5J 4L5

Phone: (780) 427-8217 (in Edmonton)
310-0000 (Toll-free within Alberta)
Fax: (780) 422-5255
Email: measurement.learning@gov.ab.ca

Project Manager

Elaine Solez, Senior Manager
Performance Measurement and Reporting
Alberta Education

ISSN 1715-0914

Comments?

Send an email to: measurement.learning@gov.ab.ca

Education Planning 2007-2019 and Results Reporting November 2007

Requirements for Alberta school boards and Francophone school authorities and their schools

Table of Contents

What's Changed	ii
1. Background	1-1
Accountability Framework for the K-12 Education System	1-1
Performance Management Cycle for School Authority Accountability	1-2
Accountability Pillar of the Renewed Funding Framework	1-2
Development of the Accountability Pillar	1-3
Accountability Pillar Measures and Categories	1-4
Accountability Pillar Evaluation Methodology	1-4
Accountability Pillar Results and Evaluations for Jurisdictions	1-6
Jurisdiction and Alberta Education Review and Follow-up	1-7
2. Education Plans for School Jurisdictions, 2007 – 2010	2-1
Preparing Education Plans	2-1
Updating Education Plans	2-2
Communicating Education Plans	2-2
Education Plan Due Date	2-2
Reviewing Education Plans	2-3
Components and Requirements of Education Plans 2007 – 2010	2-3
Requirements for School Education Plans 2007 – 2010	2-7
3. Results Report for 2006/07 (November 2007)	3-1
Preparing Results Reports	3-1
Reporting-Related Communications	3-2
Results Report Due Date	3-2
Reviewing Annual Education Results Reports	3-3
Components and Requirements for the November 2007 AERR	3-3
Requirements for School Results Report for 2006/07	3-6

Appendices

A. Sample Format for School Board Plans	1
B. Definitions for Required Performance Measures	13
C. Glossary of Planning and Accountability Terms	17
D. References	23

What's changed?

	Page
Jurisdictions are to develop for implementation in September 2007 specific Action Plans to improve results for any Accountability Pillar measure with an evaluation of "Concern" in May 2007 and an evaluation in the previous year (May 2006) of "Issue" or "Concern."	1-7
The required wording of the Accountability Statement has been streamlined.	2-2, 3-3 and Appendix A
Changes in education plan and AERR requirements are noted below and are highlighted in the text.	
Jurisdiction Three-Year Education Plans	
<ul style="list-style-type: none"> All jurisdictions must include improvement strategies in their three-year plan that address Accountability Pillar results. 	1-7 and 2-6
<ul style="list-style-type: none"> Targets for each year of the plan for measures evaluated as "Issue" or "Concern" must indicate incremental progress toward or attainment of the next higher achievement standard over the plan period. 	2-4
<ul style="list-style-type: none"> Include in the Budget Highlights section information on major changes or shift in focus over the previous year to address Accountability Pillar results. 	2-6
Jurisdiction AERRs	
<ul style="list-style-type: none"> When Accountability Pillar results have improved or improved significantly, jurisdictions include in their comments on results in the AERR the actions taken (e.g., strategies) that may have contributed to the improvement. 	3-4
<ul style="list-style-type: none"> To avoid confusion, the document contains the AERR requirements only for 2007, based on the 2006/07 school year (the education plan for 2006 – 2009). The AERR requirements for 2008, based on the education plan for 2007 – 2010, will be included in the 2008 edition of the guide. 	3-3 to 3-7
School Plans and AERRs	
<ul style="list-style-type: none"> Schools with high school programs include the full set of student outcome measures, including the following new measures: <ul style="list-style-type: none"> Annual dropout rate of students aged 14-18 High school completion rates (3-year rates in plans, 3, 4 and 5-year rates in reports) Rutherford scholarship eligibility High school to post-secondary transition rates (4-year rates in plans, 4 and 6-year rates in reports) 	2-7 & 2-8 and 3-6 & 3-7
Clarifications	
<ul style="list-style-type: none"> Interface of requirements for jurisdiction three-year plans, AERRs, and Audited Financial Statements (AFS) with the <i>Standards for Special Education</i> (amended June 2004) http://www.education.gov.ab.ca/k_12/specialneeds. Please note that including: <ul style="list-style-type: none"> Strategies that address programs and services for students with special needs in jurisdiction three-year education plans meets the planning requirement in 14.a of the <i>Standards for Special Education</i> Information on programs and services provided and results achieved for students with special needs in jurisdiction AERRs meets the non-financial reporting requirements in 14.a and c of the <i>Standards for Special Education</i>. Schedule C of the jurisdiction AFS meets the financial reporting requirement of 14.c of the <i>Standards for Special Education</i>. An appendix has been added defining the required performance measures. 	2-4 3-4 Appendix B

Background

Section 16(2) of the *Government Accountability Act* requires organizations under the jurisdiction of government ministries to prepare business plans and annual reports for each fiscal year “in the form and at a time acceptable to the Minister.” Section 78 of the *School Act* requires school boards to use accountability information and report it to students, parents and electors in a manner the Minister prescribes.

School jurisdiction plans and reports align with and build on Alberta Education’s vision, mission, goals and outcomes for the basic education system. In this way, these documents help ensure that the Kindergarten to Grade 12 education system is focused on a common purpose and direction to meet the educational needs of Alberta students. At the same time, jurisdiction plans and reports incorporate local goals, priorities and outcomes that reflect the unique characteristics and circumstances of their communities. In short, they reflect local needs and priorities within the context of a province-wide framework.

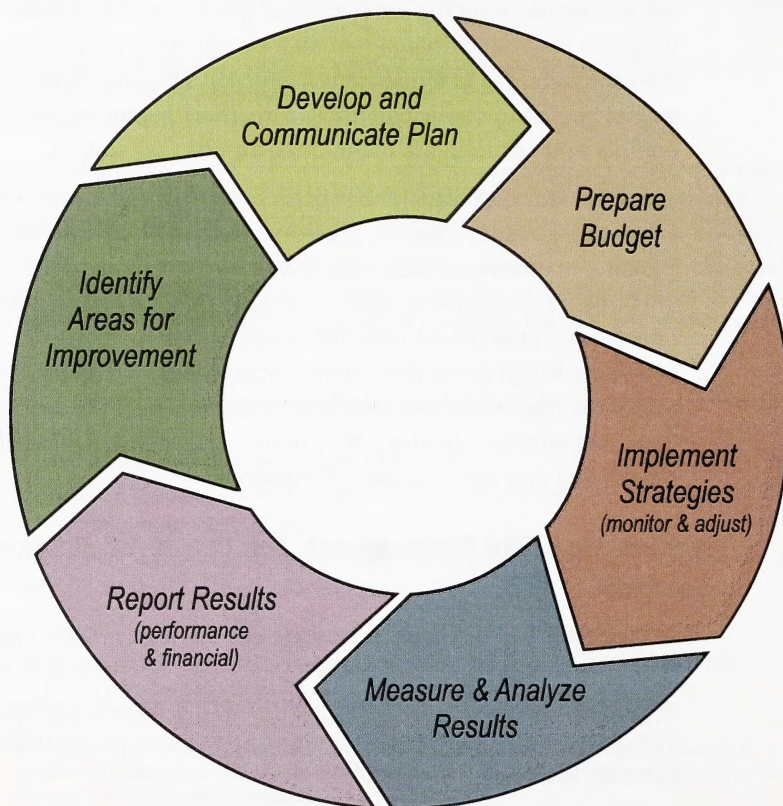
Accountability Framework for the K-12 Education System

Accountability in the basic education system involves an ongoing performance management cycle that enables continuous improvement and critical reflection. Key components are measuring progress and using results to inform decision making. For school jurisdictions and their schools, the cycle consists of:

- developing plans that are aligned with provincial goals and outcomes and incorporating community input;
- preparing budgets that allocate resources to achieve goals and improve results;
- implementing strategies to improve student learning,
- monitoring and adjusting as needed;

- measuring, analyzing and reporting results;
- using results to identify areas for improvement and develop strategies for the next plan, i.e., evidence-based decision making; and
- communicating with stakeholders (staff, students, parents or guardians, school councils, the public, and Alberta Education) about school jurisdiction and school plans and results.

Performance Management Cycle for School Authority Accountability



Accountability Pillar of the Renewed Funding Framework

Accountability for results was strengthened with the implementation of the Renewed Funding Framework for school jurisdictions, which is based on three Pillars: Flexibility, Accountability and Funding, and has the following fundamental characteristics:

- equitable distribution of funds;
- increased flexibility in use of funds to facilitate local decision making; and
- public accountability for use of resources and results achieved.

The Accountability Pillar places increased emphasis on achieving outcomes, reporting results and using results for informed decision making for the purpose of improving programs and student results in subsequent years. School jurisdiction performance is measured, evaluated and reported by comparing current results against both past performance and provincial standards on a common set of measures for all jurisdictions, using a common evaluation methodology.

School boards continue to be accountable for meeting the learning needs of all students and ensuring that provincial legislation, regulations, policies, and standards are met.

Development of the Accountability Pillar

Drawing on the work of the Funding Framework Review Committee and the Review Committee on Outcomes, the Accountability Pillar Design and Implementation Advisory Sub-Committee (the sub-committee) has worked with Alberta Education to develop the Accountability Pillar, including identifying the common set of performance measures. The following organizations are represented on the sub-committee: Alberta School Boards Association (ASBA), College of Alberta School Superintendents (CASS), Association of School Business Officials of Alberta (ASBOA), The Alberta Teachers' Association (ATA), Alberta Home & School Councils' Association (AHSCA), Fédération des conseils scolaires francophones de l'Alberta (FCSFA).

The sub-committee's guiding principles for the Accountability Pillar:

- transparent process
- emphasis on achievement
- holistic approach to evaluation
- on-going collaborative processes
- all jurisdictions can succeed.

The Accountability Pillar is aligned with Alberta Education's goals and outcomes for the K – 12 system and is integrated with the accountability framework in place since 1995. It focuses on:

- supporting continuous improvement
- improving student outcomes
- providing a clear understanding of jurisdiction performance and successes.

Accountability Pillar Measures and Categories

The sub-committee grouped the Accountability Pillar measures into the following seven categories that represent key aspects of education that are important to parents and the public:

- Safe and caring schools
- Student learning opportunities
- Student learning achievement (Grades K – 9)
- Student learning achievement (Grades 10 – 12)
- Preparation for lifelong learning, employment and citizenship
- Parental involvement
- Continuous improvement.

See page 2-5 for a list of Accountability Pillar measures by category.

The Accountability Pillar enhances performance measurement in school jurisdictions. It includes:

- an expanded set of performance measures
- results of consistent surveys of parents, students and teachers, administered annually by Alberta Education
- standard methodology to evaluate results
- consistent, accessible data reports to jurisdictions for use in jurisdiction planning and reporting.

Accountability Pillar Evaluation Methodology

Each measure within the set of Accountability Pillar measures is evaluated on two bases: achievement and improvement, then given an overall evaluation that combines the achievement and improvement evaluations.

The **achievement** evaluation compares the current jurisdiction result against fixed standards for each measure, which are set by selecting the 5th, 25th, 75th and 95th percentiles on the distribution of all jurisdictions' baseline three-year average results. These standards are held constant for seven to ten years. The comparison of the current result to the standards results in one of the following achievement levels:

- Very high (blue) for results at or above the 95th percentile
- High (green) for results between the 75th and 95th percentiles
- Intermediate (yellow) for results between the 25th and 75th percentiles
- Low (orange) for results between the 5th and 25th percentiles
- Very low (red) for results below the 5th percentile.

Note: The Achievement Evaluation Table in the Measure Evaluation Reference section of the jurisdiction's Accountability Pillar Overall Summary report contains the range of values for each standard for each measure.

The **improvement** evaluation compares the current jurisdiction result with the prior three-year average jurisdiction result for each measure, using a statistical test to determine the extent of change. This results in one of the following improvement levels:

- Improved significantly (blue)
- Improved (green)
- Maintained (yellow)
- Declined (orange)
- Declined significantly (red)

The evaluations of improvement and achievement are combined for the **overall** evaluation for the measure, resulting in one of the following overall evaluations for the measure:

- Excellent (blue)
- Good (green)
- Acceptable (yellow)
- Issue (orange)
- Concern (red)

The table below indicates how the achievement and improvement evaluations are combined to arrive at an overall evaluation for each measure.

Improvement	Achievement				
	Very High	High	Intermediate	Low	Very Low
Improved Significantly	Excellent	Good	Good	Good	Acceptable
Improved	Excellent	Good	Good	Acceptable	Issue
Maintained	Excellent	Good	Acceptable	Issue	Issue
Declined	Good	Acceptable	Issue	Issue	Concern
Declined Significantly	Acceptable	Issue	Issue	Concern	Concern

Similarly, each of the seven categories of measures is given an evaluation that is based on an average of the overall evaluation for each measure within the category. This results in one of the following category evaluations:

- Excellent (blue)
- Good (green)
- Acceptable (yellow)
- Issue (orange)
- Concern (red)

Example of measure and category evaluations:

Category	Measure	Evaluations			
		Achievement	Improvement	Overall	Category
Student Learning Achievement (Grades 10 – 12)	Diploma: Acceptable	High	Maintained	Good	Acceptable
	Diploma: Excellence	Intermediate	Declined	Issue	
	Diploma Exam Participation Rate (4+ Exams)	Intermediate	Maintained	Acceptable	
	Rutherford Scholarship Eligibility Rate	High	Improved	Good	

Accountability Pillar Results and Evaluations for Jurisdictions

Alberta Education collects data, calculates and provides five years of results, prior three-year averages and evaluations for the Accountability Pillar measures and categories to school jurisdictions twice a year. The early May results are provided for jurisdictions to use in preparing the three-year plan. The update is provided in early October, when the new year of achievement test and diploma exam results are available, for reporting in the AERR.

Four years of results that will be available for survey measures in May 2007 for the first time are needed to evaluate a measure. The first complete Accountability Pillar evaluation report that will include evaluations for all measures and categories will be provided to jurisdictions in May 2007.

School-level evaluations also will be provided to school jurisdictions for the first time in May 2007. These will assist jurisdictions and schools to address results and improve programs for students.

Jurisdiction and Alberta Education Review and Follow-up

The evaluation of the Accountability Pillar measures provides a consistent and transparent framework for interpreting results and helps jurisdictions identify areas needing improvement.

The results and evaluations of Accountability Pillar measures provide information on jurisdiction performance and trends over time.

Jurisdictions are expected to apply their expertise in data and program analysis as well as their knowledge of local conditions (context) to develop an understanding of the results. Jurisdictions are responsible for working with their schools to determine how best to bring about improvement.

All jurisdictions are required to address Accountability Pillar results in their three-year plans by including improvement strategies. For any measure with an overall evaluation of "Issue" or "Concern", jurisdictions are required to include and clearly identify (e.g., highlight) strategies in their three-year education plans that will improve results over time, taking into account the factors affecting performance based on data and contextual analysis. Jurisdictions also must set incremental targets for measures that have an overall evaluation of "Issue" or "Concern" for each year of the plan.

For any measure with two or more years of low or declining results, i.e., those with a current evaluation of "Concern" in May 2007 and an evaluation of "Issue" or "Concern" in the previous year (May 2006), jurisdictions must:

- develop specific Action Plans to address and improve these results, and
- have these Action Plans ready for implementation in September 2007.

Alberta Education staff will continue to meet with jurisdiction staff and review jurisdiction three-year education plans and AERRs annually. These reviews will include looking at Accountability Pillar measure results and evaluations and discussing the jurisdiction's efforts to maintain good results and to improve results where needed. Alberta Education will work with jurisdictions collaboratively on a priority basis, when measures and category evaluations drop to or remain at the "Issue" or "Concern" level.

Alberta Education's annual analysis of school board plans and annual analysis of school board AERRs will be replaced, starting in 2007, with a single document on both three-year education plans and AERRs that will contain information to help jurisdictions:

- develop effective strategies that foster high achievement and/or improvement in Accountability Pillar measures
- analyze and address factors affecting low or declining performance on Accountability Pillar measures.

Education Plans for School Jurisdictions, 2007 – 2010

An Overview of the Process

Preparing Education Plans

The education plans prepared by school jurisdictions and schools encompass a three-year time frame. These are updated each year and aligned with the board's budget and with Alberta Education's three-year business plan. As one year is completed, another is added. At the same time, strategies and budgets are adjusted in response to performance results, the Accountability Pillar evaluation, changes in jurisdiction priorities and the operating environment. This approach allows school jurisdictions to be responsive to students and community needs while focusing on continuous improvement and maintaining continuity from year to year.

The school board is ultimately accountable for and approves the jurisdiction three-year education plan. The elected board provides overall direction for the education plan. In consultation with parents, jurisdiction and school staff and other stakeholders in their community, the jurisdiction administration develops a planning and budgeting process that meets jurisdiction needs and is responsible for preparing the content of the plan and the budget to resource the plan for approval by the board.

An **optional** format is provided in Appendix A that includes all the required elements of the jurisdiction plan. This format also is posted on the Internet as a Word template for school jurisdictions to download and use. If the jurisdiction chooses to use a format of its own design, the sample format can be used as a checklist to ensure all requirements are included.

Schools develop and implement three-year education plans aligned with jurisdiction and provincial direction. Education plans for schools are

developed by school administrators and teaching staff, in consultation with school councils and jurisdiction staff.

Updating Education Plans

School jurisdictions and schools update their three-year education plans each year. Annual updates take the following considerations into account:

- Jurisdiction and school results and evaluations of Accountability Pillar measures and categories
- Input from stakeholders such as school councils, students, parents and the public
- Available resources
- Alberta Education's three-year business plan and provincial performance results and trends
- Feedback from Alberta Education.

Although entirely new plans are prepared infrequently, components such as strategies and targets are reviewed each year, while components such as the vision, mission and beliefs (foundation statements) should be revisited and refreshed on an occasional basis. Such reviews are particularly appropriate when a new board begins its term.

Communicating Education Plans

Three-year education plans are public documents. School jurisdictions are required to post their plans on their websites, including subsequent amendments or updates. They are also encouraged to use a variety of methods to communicate their plans and their achievements to the broader community, such as newspaper inserts, brochures and community meetings.

Education Plan Due Date

Three-year education plans for school jurisdictions are due by May 31 each year (**extended to June 22, 2007 for the 2007 – 2010 plan**). School jurisdictions post their updated three-year plans on their websites by the due date and send an email to the respective Zone Director advising that the plan has been posted to the jurisdiction's website along with the web-link to the plan. If plans are revised after the initial notification, advise the Zone Director by email of the changes and the posting of the revised plan.

Reviewing Education Plans

Alberta Education staff review three-year education plans and discuss them with superintendents to:

- enhance the department's understanding of the jurisdiction's context;
- identify ways the department can support jurisdiction improvement efforts;
- monitor compliance with provincial requirements; and
- identify implications for provincial planning.

Components and Requirements of Education Plans 2007 – 2010

[Components are required unless identified as optional. Components are defined in Appendix C, pages 15-16. An **optional** format is provided in Appendix A and posted as a Word document on the Ministry's website that jurisdictions can use in preparing their three-year plans.]

☐ **Message from board chair** (optional)

☐ An **accountability statement**, worded as follows:

The Education Plan for (name of jurisdiction) for the three years commencing September 1, (year) was prepared under the direction of the Board in accordance with the responsibilities under the *School Act* and the *Government Accountability Act*. This Education Plan was developed in the context of the provincial government's business and fiscal plans. The Board is committed to achieving the results laid out in this plan.

☐ **Foundation Statements** (optional). Vision, mission, principles and beliefs.

☐ **A Profile of the Jurisdiction** (optional).

☐ **Trends and issues** (optional).

☐ **Provincial goals, related outcomes, performance measures, targets and strategies.** Include:

- the one-page evaluation of jurisdiction results from the May 2007 Accountability Pillar Overall Summary report provided by Alberta Education, which contains the evaluation for each measure and category

- required goals, outcomes and performance measures (see list on page 2-5).

For each required outcome, include:

- required measures (see list on page 2-5) including the most recent (current) result and the previous three-year average result
- for Accountability Pillar measures, also include the measure evaluations (improvement, achievement, and overall)

Note: The data for required measures needed for the jurisdiction plan are provided on the Extranet in early May 2007. This data will be updated for the AERR in October. To retain the May data, jurisdiction staff can download the reports onto their network or desktop computers.

- Jurisdiction targets for each year of the plan are required for measures with an overall evaluation of "Issue" or "Concern." These targets must reflect reasonable progress toward or moving into the next higher achievement standard, as defined by the evaluation methodology, over the plan period. For example, if the jurisdiction result is more than 10 percentage points below the next higher achievement standard, it may not be possible to move into that higher standard in three years, but it would be possible to achieve results that are closer to the next standard. Refer to the Achievement Evaluation Table included in the Accountability Pillar Overall Summary report on the Extranet.

Notes:

- As gains are made toward or into the next achievement standard, the improvement evaluation will reflect this progress with an evaluation of "Maintained" or higher.
- While useful, especially for Accountability Pillar measures, targets are not required except for the Accountability Pillar measures with an overall evaluation of "Issue" or "Concern."

Required Goals, Outcomes, Performance Measures and Targets

Listed below are all the required goals, outcomes and performance measures for school jurisdiction three-year education plans for 2007/08 to 2009/10. Targets for each year of the plan are required for Accountability Pillar measures with an overall evaluation of "Issue" or "Concern." Measures that are not part of the Accountability Pillar are shaded. Survey measures typically consist of a number of questions for each respondent group.

Categories	Goals, Outcomes and Performance Measures
Safe and Caring Schools	<p>Goal One: High Quality Learning Opportunities for All Outcome: Schools provide a safe and caring environment for students.</p> <ul style="list-style-type: none"> Percentages of teachers, parents and students who agree that students are safe at school, are learning the importance of caring for others, are learning respect for others and are treated fairly in school. <p>Outcome: The education system meets the needs of all K-12 students, society and the economy.</p> <ul style="list-style-type: none"> Percentages of teachers, parents and students satisfied with the opportunity for students to receive a broad program of studies, including fine arts, career, technology, and health and physical education. Percentages of teachers, parents and students satisfied with the overall quality of basic education. Percentages of teachers, parents and students satisfied with the accessibility, effectiveness and efficiency of programs and services for students in their community (clarified wording). <p>Outcome: Children at risk have their needs addressed through effective programs and supports.</p> <ul style="list-style-type: none"> Annual dropout rate of students aged 14 to 18. <p>Outcome: Students complete programs.</p> <ul style="list-style-type: none"> Percentages of students who completed high school within three years of entering Grade 10.
Student Learning Opportunities	
Student Learning Achievement, K-9	<p>Goal Two: Excellence in Student Learning Outcomes Outcome: Students demonstrate high standards.</p> <ul style="list-style-type: none"> Percentages of students who achieve the acceptable standard, and the percentages who achieve the standard of excellence on Grades 3, 6 and 9 Provincial Achievement Tests (cohort results). Percentages of students who achieve the acceptable standard and percentages who achieve the standard of excellence on diploma examinations. Percentages of students who have written four or more diploma exams by the end of their third year of high school. Percentages of Grade 12 students who meet the Rutherford Scholarship eligibility criteria. <p>Outcome: Students are well prepared for lifelong learning.</p> <ul style="list-style-type: none"> High school to post-secondary transition rate within four years of entering Grade 10. <p>Outcome: Students are well prepared for employment.</p> <ul style="list-style-type: none"> Percentages of teachers and parents who agree that students are taught attitudes and behaviours that will make them successful at work when they finish school. <p>Outcome: Students model the characteristics of active citizenship.</p> <ul style="list-style-type: none"> Percentages of teachers, parents and students who agree that students model the characteristics of active citizenship.
Student Learning Achievement, 10-12	
Preparation for Life Long Learning, Employment, and Citizenship	
Involvement	<p>Goal Three: Highly Responsive and Responsible Jurisdiction Outcome: The jurisdiction demonstrates effective working relationships with partners and stakeholders.</p> <ul style="list-style-type: none"> Percentages of teachers and parents satisfied with parental involvement in decisions about their child's education. <p>Outcome: The jurisdiction demonstrates leadership and continuous improvement.</p> <ul style="list-style-type: none"> Percentages of teachers and parents indicating that their school and schools in their jurisdiction have improved or stayed the same the last three years. Percentages of teachers reporting that in the past 3-5 years the professional development and in-servicing received from the school authority has been focused, systematic and contributed significantly to their ongoing professional growth (clarified wording).
Continuous Improvement	

Notes:

- Consistent with the *Freedom of Information and Protection of Privacy Act*, when the number of students or survey participants in a group is less than six, data must not be reported to protect individual privacy.
- Shaded measures are ACOL measures; the remainder are Accountability Pillar measures on which school jurisdictions are evaluated.
- See Appendix B for a brief definition of each performance measure.

- Local strategies (at least one strategy for each outcome in the plan), including strategies in all jurisdiction education plans that:
 - address learning needs and achievement of outcomes for all students,
 - reflect local context and needs of specific student populations (Note: including strategies for students with special needs satisfies the planning component of 14.a of the *Standards for Special Education* (amended June 2004) http://www.education.gov.ab.ca/k_12/specialneeds),
 - are designed to improve jurisdiction selected Accountability Pillar results. **Jurisdictions with an overall evaluation of “Issue” or “Concern” based on the evaluation of Accountability Pillar results are required to clearly identify (e.g., highlight) their strategies for improving results for those measures.**
- ❑ **Budget Highlights.** This section presents highlights from the board’s budget for the first year of the three-year plan in a way that is easily understood, transparent and meaningful to parents and the public. Budget highlights must provide key financial information about the upcoming school year, **focusing on anticipated major changes or shifts in focus to address Accountability Pillar results.** This section may refer to budgeted changes in enrolment, certificated and non-certificated staff, programs, funding, revenues and expenses, annual surpluses or deficits and accumulated surpluses. This section must include:
 - guiding principles the board uses in financial planning
 - charts/tables that summarize information from the board’s budget
 - a web-link to the jurisdiction’s Budget Report Form.
- ❑ **Highlights of facility and capital plans.** Include:
 - A brief description of major school renewal or construction projects underway or planned over the next three years (if applicable) and their benefit to students (*which students, programs, schools*).
 - A web link to more detailed information on the jurisdiction’s facility and capital plans.
- ❑ **Publication and Communication.** School jurisdictions must post their updated education plans on their websites by May 31st

(for this year, extended to June 22, 2007), and indicate how the plan was or will be communicated to parents and the public.

Requirements for School Education Plans 2007 – 2010

A school's education plan reflects and is aligned with the jurisdiction's three-year plan. Each jurisdiction outlines its own requirements for the content and format for school plans. In addition, the provincial goals and measures listed below are required in school plans. Although Alberta Education does not routinely collect or review individual school plans, the department stipulates the following requirements to ensure consistency among school, jurisdiction and ministry plans. It is the responsibility of school jurisdictions to ensure that these requirements are met:

- Every school must prepare a three-year education plan that identifies goals, outcomes, strategies and performance measures.
- School plans must include the goals of the Alberta Education business plan, strategies for achieving the goals and performance measures for assessing achievement, including required measures along with the most recent school, jurisdiction and provincial results, specified below, as applicable (e.g., high schools would not include PAT results).
 - Goal One: High quality learning opportunities for all
 - Annual dropout rate of students aged 14-18
 - three-year high school completion rates.
 - Goal Two: Excellence in student learning outcomes
 - Percentages of all students in Grades 3, 6 and 9 who achieve the acceptable standard and the percentages who achieve the standard of excellence on provincial achievement tests (the cohort).
 - Participation rates in provincial achievement tests.
 - Percentages of students who achieve the acceptable standard and the percentages who achieve the standard of excellence on diploma examinations.
 - Diploma examination participation rate (percentages of students who have written four or more diploma exams by the end of their third year of high school).

- Percentages of Grade 12 students who meet the Rutherford Scholarship eligibility criteria.
- four-year high school to post-secondary transition rates.

Notes:

- See Appendix B for brief descriptions of each performance measure.
 - The information for these measures is available on the Alberta Education Extranet.
 - Targets are useful for measures where results over time are available, but are not required.
 - Consistent with the *Freedom of Information and Protection of Privacy Act*, when the number of students or survey participants in a group is less than six, data must not be reported to protect individual privacy.
- Goal Three: Highly responsive and responsible school

In addition:

- School councils **must** have the opportunity to participate in the development of the school's three-year education plan, including input on strategies.
- School plans **must** describe how the school council was involved in the development of the plan.

Results Report for 2006/07 (November 2007)

An Overview of the Process

Preparing Results Reports

Each year, school jurisdictions measure and interpret their performance and report on their progress toward achieving the goals and outcomes of their three-year education plans in their Annual Education Results Report (AERR). This includes measuring and reporting on local measures and reporting and responding to the measurement information and evaluations received from Alberta Education. The Accountability Pillar performance measure results and evaluations are a primary source of information for assessing and reporting on performance, and are used along with other jurisdiction results and contextual information to determine where improvements are needed.

The AERR is prepared under the direction of the board, using a process determined by jurisdiction staff. The report is approved by the elected board or francophone authority and informs stakeholders where the jurisdiction is in relation to where it wants to be in achieving its goals and outcomes. It demonstrates that the school board is accountable for results and for the wise use of resources to provide quality programs for students and to address areas for improvements. AERRs provide jurisdictions and schools with the opportunity to summarize their accomplishments, in addition to reporting on performance.

Note: An optional format for the AERR is under development and will be posted when available. Superintendents will be notified of the posting.

In preparing their results reports, school jurisdictions compile and assess jurisdiction results and evaluations that pertain to the performance measures identified in their three-year education plans, taking into account provincial results, trends and context (see Alberta Education's 2006/07

(November 2007)

Annual Report published September 2007 for provincial content), as well as local context. Jurisdiction results come from:

- Alberta Education, which provides results and evaluations on the Extranet for the required measures, as follows:
 - Accountability Pillar surveys of students, parents and teachers.
 - Results from provincial achievement tests and diploma examinations.
 - Diploma examination participation rates.
 - High school completion rates, dropout rates, high school to post-secondary transition rates and Rutherford Scholarship eligibility rates.
- Local sources (schools and jurisdictions) including locally developed surveys* used to collect information for optional local performance measures.

Reporting-Related Communications

Annual education results reports (AERRs) are public documents.

School jurisdictions **are required to** post their AERRs on their websites.

Jurisdictions are encouraged to use tools such as newspaper inserts, brochures, and community meetings to make the information more broadly accessible to parents and the public. Information that is summarized for public distribution must include results for all performance measures reported in the jurisdiction's AERR.

A school jurisdiction's AERR **must** identify how the report was or will be communicated to the public. It must also indicate how the annual results reports prepared by schools in the jurisdiction are communicated to parents and to the community, and include web links to school websites and school results reports.

Results Report Due Date

School jurisdictions post their AERR by the **due date of November 30** and notify Alberta Education. Send an email to the respective Zone Director, advising that the report has been posted to the jurisdiction's website and

* To support school jurisdictions in their local efforts to survey stakeholders, Alberta Education prepared a useful handbook, *How to Conduct Satisfaction Surveys: A Practical Guide to Conducting Surveys within Alberta's Education System*. The handbook can be downloaded from the department's website: <http://www.education.gov.ab.ca/educationsystem/Satisfaction>.

(November 2007)

providing the web link to the report. If the report is revised following the initial notification, inform your Zone Director of the changes and re-posting.

Reviewing Annual Education Results Reports

Alberta Education staff review school jurisdictions' AERRs to:

- enhance the department's understanding of jurisdiction results;
- determine whether implications of results for the next update of the jurisdiction plan have been considered, e.g. how shortfalls in performance will be addressed;
- monitor compliance with provincial requirements;
- ensure consistency with the related education plan;
- identify ways Alberta Education can support jurisdiction results reporting and improvement efforts; and
- identify implications for the department's planning.

Components and Requirements for the November 2007 AERR

The November 2007 Annual Education Results Report includes the components listed below (revisions since the March 2006 guide are highlighted). A template for the AERR is under development and will be provided to jurisdictions when available.

☐ A **message** from the board chair (optional).

☐ An **accountability statement**, worded as follows:

The annual education results report for **(name of jurisdiction)** the **(year)** school year was prepared under the direction of the board in accordance with the responsibilities under the *School Act* and the *Government Accountability Act*. The board is committed to using the results in this report, to the best of our abilities, to improve the outcomes for students in our jurisdiction. We will use the results to develop sound strategies for our three-year education plan to ensure that all our students can acquire the knowledge, skills and attitudes they need to be self-reliant, responsible, caring and contributing members of society.

☐ Information on how the report was or will be communicated to parents and the public.

- ❑ Information on how the results reports prepared by schools in the jurisdiction were communicated to parents and to the community.
- ❑ Highlights for the previous year, including:
 - The Accountability Pillar Overall Summary report provided by Alberta Education in October 2007.
 - the jurisdiction's **accomplishments** (impact of major activities/strategies), including programs and achievement of specific groups of students and web-links to the jurisdiction's AISI annual report and class size report. (Note: reporting on programs, services and results for students with special needs satisfies the non-financial reporting component of Section 14.a and c of the *Standards for Special Education* (June 2004) http://www.education.gov.ab.ca/k_12/specialneeds.)
- ❑ Report the jurisdiction's **performance measure results** from the jurisdiction's education plans for 2006/07 – 2008/09 in relation to the goals, outcomes and targets for 2006/07 in the three-year plan (see page 2-5 for list of required measures). Specifically, for each required measure, report:
 - five years of jurisdiction and provincial results (or available results if less than five years),
 - 2006/07 result in relation to the target for that year (if applicable),
 - progress toward the improvement target set for 2008/09 for Accountability Pillar measures with an evaluation of "Issue" or "Concern" in May 2006; and,
 - comment on results, such as contextual information, factors affecting performance and analysis of results; if results on Accountability Pillar measures have an improvement evaluation of "Improved" or "Improved significantly," identify the strategies or action taken by the jurisdiction (or schools) that may have contributed to this improvement.
 - for provincial achievement tests and diploma examinations, report five years of acceptable and excellence results for each grade and subject, as well as the overall results (all subjects and grades combined)
 - for high school completion rates, report five years of three, four and five-year rates

(November 2007)

- for post-secondary transition rates, report five years of four and six-year rates.

Notes:

- Consistent with the *Freedom of Information and Protection of Privacy Act*, when the number of students or survey participants in a group is less than six, data must not be reported to protect individual privacy.
- For Accountability Pillar survey measures, results from the Accountability Pillar Survey, rather than the jurisdiction's own surveys, must be reported. Jurisdiction survey results may be used to report on local measures.

- ☐ Identify **future challenges**, including areas for improvement and how the jurisdiction will address these.

- ☐ **Summary of Financial Results**

- provide key financial information about the school year, such as significant changes over the prior year, the annual operating surplus or deficit, accumulated operating surplus and capital reserves;
- include program expenditure information in a table or graph format for the primary audience – parents and other members of the community;
- indicate where more information on the jurisdiction's sources of school generated funds and their uses can be obtained (e.g. web-link to the Audited Financial Statements, contact at central office) and that comparative information is available in a provincial report – provide the web-link to the provincial roll up of jurisdiction AFS information: <http://www.education.gov.ab.ca/funding/afs/> ;
- provide a web-link to the jurisdiction's Audited Financial Statements for 2006/07.

- ☐ **Capital and Facilities Projects**

- highlight, for parents and the public, progress on major school facilities projects, i.e., building renewal and construction for the previous school year, as applicable, focusing on benefits to students, e.g., improved accommodation of students, enhanced learning opportunities *[which students, programs, schools]*.

- ☐ **Publication and Communication:** School jurisdictions must post their AERR for 2006/07 on the jurisdiction website by November 30, 2007 and notify the Zone Director. The AERR also must include the following information:

- how the annual results reports prepared by schools in the jurisdiction are communicated to parents and the public
- web links to school websites and school results reports.

Note:

An online AERR is under development. In the meantime, jurisdictions have the following options:

- use the Accountability Pillar reports provided by Alberta Education as an appendix to their AERR and provide the additional required information, i.e., targets and commentary on results, in the main part of the AERR using a format of their choosing, or
- copy and paste from the Accountability Pillar report into their own document (provided in Excel to facilitate this option), or
- use the AERR format that is being prepared and will be posted on the planning resources web page when available:
<http://www.education.gov.ab.ca/educationsystem/planning.asp>.
Jurisdictions will be notified of the posting.

Requirements for School Results Report for 2006/07

A school's annual education results report is closely aligned with the AERR prepared by the jurisdiction. Each jurisdiction establishes requirements for the content and process for school annual reports. In addition, the elements listed below are required by Alberta Education, to ensure alignment at all levels — school, jurisdiction and provincial.

Alberta Education does not routinely collect or review the annual results reports prepared by individual schools. It is the responsibility of school jurisdictions to ensure that the following school reporting requirements are met. A school report must include:

- Results information related to *all* the goals, outcomes and performance measures — both local and provincial — identified in the school's education plan, including the following required measures, as applicable (e.g., high schools would not report PAT results):
 - Annual dropout rate of students aged 14-18
 - 3, 4 and 5-year high school completion rates.
 - Percentages of all students in Grades 3, 6 and 9 who achieve the acceptable standard and percentages who achieve the standard of excellence on provincial achievement tests (the cohort).
 - Participation rates in provincial achievement tests (PATs) for Grades 3, 6 and 9.

(November 2007)

- Percentages of students who achieve the acceptable standard and percentages who achieve the standard of excellence on diploma examinations.
 - Diploma examination participation rate (percentages of students who have written four or more diploma exams by the end of their third year of high school).
 - Percentages of Grade 12 students who meet the Rutherford Scholarship eligibility criteria.
 - 4 and 6-year high school to post-secondary transition rates.
- School results reporting for the required provincial measures must include:
 - an assessment of progress in relation to past performance
 - five years of school results in relation to comparable provincial and jurisdiction results
 - any target set for 2006/07 (for the report on the 2006/07 school year), 2007/08 (for the report on the 2007/08 school year) and assessment of progress toward achieving the target.

Notes:

- Schools can access the information they need for student achievement and participation rates on the Alberta Education's Extranet.
 - Reporting achievement test results for writers is optional.
 - Consistent with the *Freedom of Information and Protection of Privacy Act*, when the number of students or survey participants in a group is less than six, data must not be reported to protect individual privacy.
- A web-link to the school's class size report on the jurisdiction's website.
 - Additional information, as required by the school jurisdiction.



Sample Format for School Board Plans

The list format provided in this section contains the requirements for education plans for 2007/08 – 2009/10. School jurisdictions may wish to use this information as a checklist to ensure their plan contains all the required components, even if a format of their own design is used. All elements are required, unless otherwise identified.

Message from Board Chair (optional)

Accountability Statement

The **(jurisdiction's name)** education plan for the three years commencing September 1, **(year)** was prepared under the direction of the board in accordance with responsibilities under the *School Act* and the *Government Accountability Act*. This education plan was developed in the context of the provincial government's business and fiscal plans. The board is committed to achieving the results laid out in this education plan.

Foundation Statements (optional)

- ☐ Vision
- ☐ Mission
- ☐ Principles

Jurisdiction Profile (optional)

Appendix A-Sample Format for School Board Plans

Goal One: High Quality Learning Opportunities for All

Outcome: Schools provide a safe and caring environment for students.

Performance Measures	Current Result	Previous 3-yr Avg.	Evaluation			Targets		
			Achievement	Improvement	Overall	2007/2008	2008/2009	2009/2010
<input type="checkbox"/> May 2007 data and evaluations. <input type="checkbox"/> Targets for each year for measures with an overall evaluation in May 2007 of "Issue" or "Concern" must indicate progress toward or moving into the next higher achievement standard over the plan period.								
<ul style="list-style-type: none"> Teacher, parent, and student agreement that students are safe at school, learning the importance of caring for others, learning respect for others, and are treated fairly at school. 								
Strategies <input type="checkbox"/> Include at least one strategy for each outcome, strategies to address special populations of students, as applicable, and strategies to address Accountability Pillar results, including strategies designed to improve results on any measure with an overall evaluation of "Issue" or "Concern." <input type="checkbox"/> Strategies to address results with an evaluation of "Issue" or "Concern" must be highlighted.								

Outcome: The education system meets the needs of all K-12 students, society and the economy.

Performance Measures			Evaluation			Targets		
			Achievement	Improvement	Overall	2007/2008	2008/2009	2009/2010
<input type="checkbox"/> May 2007 data and evaluations. <input type="checkbox"/> Targets for each year for measures with an overall evaluation in May 2007 of "Issue" or "Concern" must indicate progress toward or moving into the next higher achievement standard over the plan period.	Current Result	Previous 3-yr Avg.						
<ul style="list-style-type: none">Teacher, parent, and student satisfaction with the opportunity for students to receive a broad program of studies, including fine arts, career, technology, and health and physical education.								
<ul style="list-style-type: none">Teacher, parent and student satisfaction with the overall quality of basic education.								
<ul style="list-style-type: none">Teacher, parent and student satisfaction with the accessibility, effectiveness and efficiency of programs and services for students in their community.			n/a	n/a	n/a	optional		
Strategies <input type="checkbox"/> Include at least one strategy for each outcome, strategies to address special populations of students, as applicable, and strategies to address Accountability Pillar results, including strategies designed to improve results on any measure with an overall evaluation of "Issue" or "Concern." <input type="checkbox"/> Strategies to address results with an evaluation of "Issue" or "Concern" must be highlighted.								

Note: Shaded measures are required but are not part of the Accountability Pillar.

Appendix A-Sample Format for School Board Plans

Outcome: Children at risk have their needs addressed through effective programs and supports.

Performance Measures <input type="checkbox"/> May 2007 data and evaluations. <input type="checkbox"/> Targets for each year for measures with an overall evaluation in May 2007 of "Issue" or "Concern" must indicate progress toward or moving into the next higher achievement standard over the plan period.	Current Result	Previous 3-yr Avg.	Evaluation			Targets		
			Achievement	Improvement	Overall	2007/2008	2008/2009	2009/2010
<ul style="list-style-type: none"> Annual dropout rate of students aged 14 to 18. 								
Strategies <input type="checkbox"/> Include at least one strategy for each outcome, strategies to address special populations of students, as applicable, and strategies to address Accountability Pillar results, including strategies designed to improve results on any measure with an overall evaluation of "Issue" or "Concern." <input type="checkbox"/> Strategies to address results with an evaluation of "Issue" or "Concern" must be highlighted.								

Outcome: Students complete programs.

Performance Measures <input type="checkbox"/> May 2007 data and evaluations. <input type="checkbox"/> Targets for each year for measures with an overall evaluation in May 2007 of "Issue" or "Concern" must indicate progress toward or moving into the next higher achievement standard over the plan period.	Current Result	Previous 3-yr Avg.	Evaluation			Targets		
			Achievement	Improvement	Overall	2007/2008	2008/2009	2009/2010
<ul style="list-style-type: none"> High school completion rate of students within three years of entering Grade 10. 								
Strategies <input type="checkbox"/> Include at least one strategy for each outcome, strategies to address special populations of students, as applicable, and strategies to address Accountability Pillar results, including strategies designed to improve results on any measure with an overall evaluation of "Issue" or "Concern." <input type="checkbox"/> Strategies to address results with an evaluation of "Issue" or "Concern" must be highlighted.								

Goal Two: Excellence in Student Learning Outcomes**Outcome: Students demonstrate high standards.**

Performance Measures <input type="checkbox"/> May 2007 data and evaluations. <input type="checkbox"/> Targets for each year for measures with an overall evaluation in May 2007 of "Issue" or "Concern" must indicate progress toward or moving into the next higher achievement standard over the plan period.	Current Result	Previous 3-yr Avg.	Evaluation			Targets		
			Achievement	Improvement	Overall	2007/2008	2008/2009	2009/2010
<ul style="list-style-type: none"> Percentages of students in Grades 3, 6 and 9 who achieved the acceptable standard on provincial achievement tests.* 								
<ul style="list-style-type: none"> Percentages of students in Grades 3, 6 and 9 who achieved the standard of excellence on provincial achievement tests. 								
<ul style="list-style-type: none"> Percentages of students who achieved the acceptable standard on diploma examinations.* 								
<ul style="list-style-type: none"> Percentages of students who achieved the standard of excellence on diploma examinations. 								
<ul style="list-style-type: none"> Percentages of students who have written four or more diploma exams by the end of their third year of high school. 								
<ul style="list-style-type: none"> Percentages of Grade 12 students who meet the Rutherford Scholarship eligibility criteria. 								
Strategies <input type="checkbox"/> Include at least one strategy for each outcome, strategies to address special populations of students, as applicable, and strategies to address Accountability Pillar results, including strategies designed to improve results on any measure with an overall evaluation of "Issue" or "Concern." <input type="checkbox"/> Strategies to address results with an evaluation of "Issue" or "Concern" must be highlighted.								

*The percentages achieving the acceptable standard include the percentages achieving the standard of excellence.

Appendix A-Sample Format for School Board Plans

Outcome: Students are well prepared for lifelong learning.

Performance Measures <input type="checkbox"/> May 2007 data and evaluations. <input type="checkbox"/> Targets for each year for measures with an overall evaluation in May 2007 of "Issue" or "Concern" must indicate progress toward or moving into the next higher achievement standard over the plan period.	Current Result	Previous 3-yr Avg.	Evaluation			Targets		
			Achievement	Improvement	Overall	2007/2008	2008/2009	2009/2010
<ul style="list-style-type: none"> High school to post-secondary transition rate within four years of entering Grade 10. 								
Strategies <input type="checkbox"/> Include at least one strategy for each outcome, strategies to address special populations of students, as applicable, and strategies to address Accountability Pillar results, including strategies designed to improve results on any measure with an overall evaluation of "Issue" or "Concern." <input type="checkbox"/> Strategies to address results with an evaluation of "Issue" or "Concern" must be highlighted.								

Outcome: Students are well prepared for employment.

Performance Measures <input type="checkbox"/> May 2007 data and evaluations. <input type="checkbox"/> Targets for each year for measures with an overall evaluation in May 2007 of "Issue" or "Concern" must indicate progress toward or moving into the next higher achievement standard over the plan period.	Current Result	Previous 3-yr Avg.	Evaluation			Targets		
			Achievement	Improvement	Overall	2007/2008	2008/2009	2009/2010
<ul style="list-style-type: none"> Teacher and parent agreement that students are taught attitudes and behaviours that will make them successful at work when they finish school. 								
Strategies <input type="checkbox"/> Include at least one strategy for each outcome, strategies to address special populations of students, as applicable, and strategies to address Accountability Pillar results, including strategies designed to improve results on any measure with an overall evaluation of "Issue" or "Concern." <input type="checkbox"/> Strategies to address results with an evaluation of "Issue" or "Concern" must be highlighted.								

Outcome: Students model the characteristics of active citizenship.

Performance Measures <input type="checkbox"/> May 2007 data and evaluations. <input type="checkbox"/> Targets for each year for measures with an overall evaluation in May 2007 of "Issue" or "Concern" must indicate progress toward or moving into the next higher achievement standard over the plan period.	Current Result	Previous 3-yr Avg.	Evaluation			Targets		
			Achievement	Improvement	Overall	2007/2008	2008/2009	2009/2010
<ul style="list-style-type: none"> Teacher, parent and student agreement that students model the characteristics of active citizenship. 								
Strategies <input type="checkbox"/> Include at least one strategy for each outcome, strategies to address special populations of students, as applicable, and strategies to address Accountability Pillar results, including strategies designed to improve results on any measure with an overall evaluation of "Issue" or "Concern." <input type="checkbox"/> Strategies to address results with an evaluation of "Issue" or "Concern" must be highlighted.								

Goal Three: Highly Responsive and Responsible Jurisdiction**Outcome: The jurisdiction demonstrates effective working relationships with partners and stakeholders.**

Performance Measures <input type="checkbox"/> May 2007 data and evaluations. <input type="checkbox"/> Targets for each year for measures with an overall evaluation in May 2007 of "Issue" or "Concern" must indicate progress toward or moving into the next higher achievement standard over the plan period.	Current Result	Previous 3-yr Avg.	Evaluation			Targets		
			Achievement	Improvement	Overall	2007/2008	2008/2009	2009/2010
<ul style="list-style-type: none"> Teacher and parent satisfaction with parental involvement in decisions about their child's education. 								
Strategies <input type="checkbox"/> Include at least one strategy for each outcome, strategies to address special populations of students, as applicable, and strategies to address Accountability Pillar results, including strategies designed to improve results on any measure with an overall evaluation of "Issue" or "Concern." <input type="checkbox"/> Strategies to address results with an evaluation of "Issue" or "Concern" must be highlighted.								

Outcome: The jurisdiction demonstrates leadership and continuous improvement.

Outcome: The jurisdiction demonstrates leadership and continuous improvement.								
Performance Measures	Current Result	Previous 3-yr Avg.	Evaluation			Targets		
			Achievement	Improvement	Overall	2007/2008	2008/2009	2009/2010
<input type="checkbox"/> May 2007 data and evaluations. <input type="checkbox"/> Targets for each year for measures with an overall evaluation in May 2007 of "Issue" or "Concern" must indicate progress toward or moving into the next higher achievement standard over the plan period.								
<ul style="list-style-type: none">Percentages of teachers and parents indicating that their school and schools in their jurisdiction have improved or stayed the same in the last three years.								
<ul style="list-style-type: none">Percentages of teachers reporting that in the past 3-5 years the professional development and in-servicing received from the school authority has been focused, systematic and contributed significantly to their ongoing professional growth.			n/a	n/a	n/a	optional		
Strategies <input type="checkbox"/> Include at least one strategy for each outcome, strategies to address special populations of students, as applicable, and strategies to address Accountability Pillar results, including strategies designed to improve results on any measure with an overall evaluation of "Issue" or "Concern." <input type="checkbox"/> Strategies to address results with an evaluation of "Issue" or "Concern" must be highlighted.								

Note: Shaded measures are required but are not part of the Accountability Pillar.

Budget Highlights

- ☐ Key financial information about the upcoming school year, focusing on anticipated major changes or shifts in focus from the prior year to address evaluation of Accountability Pillar results.
- ☐ Guiding principles used in financial planning
- ☐ Charts/tables to summarize information
- ☐ A web-link to the jurisdiction's Budget Report Form

Highlights of Facility and Capital Plans

- ☐ *Brief description of major school renewal or construction projects and benefits for students.*
- ☐ *A web-link to more detailed information.*

Publication and Communication

- ☐ *Provide web link to posted document.*
- ☐ *Indicate how the three-year plan has been/will be communicated to parents and the public.*



Definitions for Required Performance Measures

Outcomes	<i>Definitions for Required Performance Measures</i>
<p>Schools provide a safe and caring environment for students.</p>	<p>Safe and Caring: Percentages of teachers, parents and students who agree that students are safe at school, are learning the importance of caring for others, are learning respect for others and are treated fairly in school.</p> <p>Definition: Teachers, parents and students are asked whether:</p> <ul style="list-style-type: none"> – students feel safe at school, – students feel safe on the way to and from school, – students treat each other well at school, – teachers care about their students, and – students are treated fairly by adults at school.
<p>The education system meets the needs of all K-12 students, society and the economy.</p>	<p>Program of Studies: Percentages of teachers, parents and students satisfied with the opportunity for students to receive a broad program of studies, including fine arts, career, technology, and health and physical education.</p> <p>Definition: Teachers, parents and students are asked about:</p> <ul style="list-style-type: none"> – the variety of courses available to students/you at school, – opportunities students/you have at school to: <ul style="list-style-type: none"> • learn about music • learn about drama • learn about art • learn about computers • learn about health • learn another language • participate in physical education. <p>Education Quality: Percentages of teachers, parents and students satisfied with the overall quality of basic education.</p> <p>Definition: Teachers, parents and students are asked about the following:</p> <ul style="list-style-type: none"> – overall quality of education in your/your child's school – the quality of teaching in your/your child's school – what is being learned in the core subjects is useful (students), students are learning what they need to know (parents and teachers) – school work is interesting – school work is challenging – learning expectations at school are clear. <p>Satisfaction with Program Access: Percentages of teachers, parents and students satisfied with the accessibility, effectiveness and efficiency of programs and services for students in their community.</p> <p>Definition: Teachers, parents and students are asked about the following services for student in schools:</p> <ul style="list-style-type: none"> – academic counselling, – career counselling,

Outcomes	<i>Definitions for Required Performance Measures</i>
	<ul style="list-style-type: none"> library services, and supports for students with special needs.
Children at Risk have their needs addressed through effective programs and supports	<p>Drop Out Rate: Annual dropout rate of students aged 14 to 18.</p> <p>Definition: Alberta students aged 14-18 are tracked for one year to determine how many have left the education system without completing. Students are considered to have dropped out if they are not enrolled in the following year or have not met the high school completion criteria, i.e., have not, within the tracking period: received a high school diploma, IOP Certificate, high school equivalency (GED), earned credit in five Grade 12 courses (including four diploma exam courses), or enrolled in a K-12 school in Alberta, an Alberta post-secondary institution or registered in an Alberta apprenticeship program.</p>
Students complete programs	<p>High School Completion Rate (3 yr): Percentages of students who completed high school within three years of entering Grade 10.</p> <p>Definition: Alberta Grade 10 students are tracked for three years to determine if they have completed high school. Student are considered to have completed high school if they have, within the tracking period,</p> <ul style="list-style-type: none"> received an Alberta high school diploma, an IOP Certificate, high school equivalency (GED), entered a post-secondary level program at an Alberta post-secondary institution registered in an Alberta apprenticeship program, or earned credit in five Grade 12 level courses, including four diploma examination courses.
Students Demonstrate High Standards	<p>PAT: Acceptable: Percentages of students who achieve the acceptable standard on Grades 3, 6 and 9 Provincial Achievement Tests.</p> <p>PAT: Excellence: Percentages of students who achieve the standard of excellence on Grades 3, 6 and 9 Provincial Achievement Tests.</p> <p>Definition: A student achieving the acceptable standard shows an adequate understanding of the core knowledge and adequate basic skills essential core academic subjects: language arts, mathematics (for Grades 3, 6 and 9) and science and social studies (for Grades 6 and 9). A student achieving the standard of excellence consistently shows a deeper understanding of the concepts of the course demonstrating an ability to integrate information and evaluate it from various points of view. Results are calculated as the percentage of all students in each grade (total enrollment in the grade plus the ungraded students who are in the corresponding year of schooling) who have met the acceptable standard and the percentage who have met the standard of excellence. The overall result is the weighted average of the result for each test.</p> <p>Diploma: Acceptable: Percentages of students who achieve the acceptable standard on diploma examinations.</p> <p>Diploma: Excellence: Percentages of students who achieve the standard of excellence on diploma examinations.</p> <p>Definition: Diploma examination results are based on the numbers of students writing each exam who achieve the standards. Achieving the acceptable standard (i.e., a mark of 50%) indicates that the student has met the basic requirements of the course. Achieving the standard of excellence (i.e., a mark of 80%) indicates that the student has performed significantly beyond the minimum requirements of the course. The overall diploma exam result is the weighted average of the result for each exam.</p> <p>Diploma Exam Participation Rate (4+ Exams): Percentages of students who have written four or more diploma exams by the end of their third year in high school.</p> <p>Definition: The diploma exam participation rate is calculated by tracking Grade 10 students for three school years to determine the percentage of students who have written four or more diploma exams within the tracking period.</p> <p>Rutherford Scholarship Eligibility Rate: Percentages of Grade 12 students who meet the Rutherford Scholarship eligibility criteria.</p> <p>Definition: Rutherford Scholarship eligibility is calculated by determining the percentage of Alberta Grade 12 students who have marks of 80% or higher in any of the eligible Grades 10, 11 or 12 courses.</p>
Students are well prepared for lifelong learning	<p>Transition Rate (4 yr): Percentages of students who have enrolled in a post-secondary program within four years of entering Grade 10.</p> <p>Definition: The high school to post-secondary transition rate is calculated by tracking Alberta Grade 10 students for four years to determine if they have entered a post-secondary-level program at an Alberta post-secondary institution or registered in an Alberta apprenticeship program within the tracking period. An estimate of out-of-province post-secondary enrollment is applied based on the numbers of funded Alberta students attending post-secondary institutions out of province.</p>

Outcomes	Definitions for Required Performance Measures
Students are well prepared for employment	<p>Work Preparation: Percentages of teachers and parents who agree that students are taught attitudes and behaviours that will make them successful at work when they finish school.</p> <p>Definition: Teachers and parents are asked to indicate whether students in your school/your child are taught attitudes and behaviours that will enable them to be successful at work they leave school.</p>
Students model the characteristics of active citizenship	<p>Citizenship: Percentages of teachers, parents and students who are satisfied that students model the characteristics of active citizenship.</p> <p>Definition: Teachers, parents and students are asked whether students at your school/your child's school:</p> <ul style="list-style-type: none"> – help each other, – respect each other, – are encouraged at school to be involved in activities that help the community (not asked of Grade 4 students), – are encouraged to try their best, and – follow the rules.
The jurisdiction demonstrates effective working relationships with partners and stakeholders	<p>Parental Involvement: Percentages of teachers and parents satisfied with parental involvement in decisions about their child's education.</p> <p>Definition: Teachers and parents are asked:</p> <ul style="list-style-type: none"> – about the opportunity for parental involvement in decisions about their child's education, – about the opportunity for parental involvement in decisions at their child's school, – whether parental input into decisions at their child's school is considered, – whether parents are involved "A Lot" or "Some" with decisions about their child's education
The jurisdiction demonstrates leadership and continuous improvement	<p>School Improvement: Percentages of teachers and parents indicating that their school and schools in their jurisdiction have improved or stayed the same the last three years.</p> <p>Definition: Teachers and parents are asked whether the quality of education at your school/your child has received has improved, stayed the same or declined in the past three years.</p> <p>Inservice Jurisdiction Needs: Percentages of teachers reporting that in the past 3-5 years the professional development and in-servicing received from the school authority has been focused, systematic and contributed significantly to their ongoing professional growth..</p> <p>Definition: Teachers are asked whether the professional development opportunities made available through the jurisdiction have:</p> <ul style="list-style-type: none"> – been focused on the priorities of the jurisdiction, – effectively addressed your professional development needs, and – significantly contributed to your on-going professional development.

Notes:

- For survey measures:
 - All teachers in K-12 schools and all students in Grades 4, 7 and 10 and their parents are included in the surveys.
 - The surveys of students and teachers are administered online, and the parent survey is mailed to the student's address on file.
 - The percentage for each respondent group is calculated by averaging the responses to all the questions that comprise the measure. The overall percentage is calculated by averaging the results for each respondent group.
 - A four-point scale is used for satisfaction and agreement questions, and don't know responses are recorded.
- For measures that track students for one or more years, an attrition estimate, i.e., the number of students in the same age group who have left the province or are deceased, is factored into the calculation.
- For measures based on the Grade 10 cohort, students are attributed to the jurisdiction where they earned the most credits.



Glossary of Planning and Accountability Terms

Accountability: An obligation to answer for assigned responsibilities, e.g., for use of funds, results achieved and for taking action to make continuous improvement and achieve desired results.

Continuous Improvement: Using performance results to adjust strategies and practices so that improvement in performance is achieved over time.

Goals: Goals are broad statements that look towards the long term and steer organizations in the direction of realizing their vision. Goals are typically expressed as desired conditions or aims.

Issues: An issue is a condition that may affect the organization's ability to fulfill its mandate or achieve its goals.

Mission Statement: A mission statement is a clear, concise description of a school jurisdiction's overall purpose and role. It gives direction to the programs and services that the jurisdiction provides for its students.

Outcomes: Outcomes are measurable statements of what school jurisdictions and schools seek to achieve. In broad terms, they answer the question, "What will this look like when we get to where we want to be?"

Performance Measures: Performance measures provide information on important, quantifiable aspects of the education system. They enable jurisdictions to assess progress toward achieving goals and outcomes.

Principles and Beliefs: Principles and beliefs guide decision-making and provide a foundation for developing mission, vision and goals.

Profile: A profile is a brief description of the school jurisdiction or school that gives context for the plan. Profiles include such information as characteristics of communities, students, programs, size and location.

Strategies: Strategies are actions that school jurisdictions and schools take to achieve goals and desired outcomes that meet the needs of all

their students. They address local circumstances, issues, trends and opportunities.

Targets: Targets show desired levels of performance to be attained by a certain time. Targets are expressed quantitatively.

Trend: A trend shows a direction of data over time, e.g., enrolment growth.

Vision: A vision describes a possible and desired future state for the organization, grounded in reality, which inspires and guides decisions and actions.

Terms Related to the Accountability Pillar Evaluation

(in logical, rather than alphabetical order)

Accountability Pillar: The Accountability Pillar is one of the three pillars of the Renewed Funding Framework and enhances school jurisdiction accountability for results in return for greater flexibility in the allocation of resources. The Accountability Pillar places increased emphasis on the achievement of specific outcomes by evaluating and reporting results on a common set of measures, and where results are low or declining, taking action to improve student programs and results in subsequent years. The focus of the Accountability Pillar is on improving school jurisdiction results and attaining high levels of achievement.

Accountability Pillar Performance Measures: The Accountability Pillar performance measures are a required, consistent set of measures, each of which is calculated on a comparable basis for all jurisdictions. School jurisdictions are required to include this common set of performance measures and evaluations in their plans and report the results and updated evaluations for these measures in their Annual Education Results Reports. The measures draw from various kinds of data, including:

- Results of provincial testing programs,
- Student outcomes, such as dropout and high school completion rates, and
- Student, parent and teacher perceptions.

Category: Accountability Pillar measures are grouped into seven categories that represent key aspects of education that are important to parents and the public:

- Safe and caring schools,
- Student learning opportunities,
- Student learning achievement (Grades K to 9),
- Student learning achievement (Grades 10 to 12),
- Preparation for lifelong learning, employment and citizenship,
- Parental involvement, and
- Continuous improvement.

Evaluation Methodology: The evaluation methodology has been developed which assesses each measure in the Accountability Pillar in terms of achievement and improvement, then combines the achievement and improvement evaluations to calculate overall evaluations for measures and categories.

Achievement Evaluation: The Achievement evaluation is based on comparing the current jurisdiction result against a set of provincial standards that are expected to be fixed for 7 – 10 years. The achievement evaluation results in one of the following five achievement levels: Very High, High, Intermediate, Low, Very Low.

Standard: A standard is an established, quantifiable level of performance that is commonly understood and agreed upon, and is the basis for judging actual performance. The standards for each Accountability Pillar measure are calculated from baseline data (based on the distribution of results for all jurisdictions at a fixed point in time). The 5th, 25th, 75th and 95th percentiles of the distribution of the baseline results are used to establish the five achievement evaluation levels (listed above under “Achievement Evaluation”).

Baseline: Baseline data constitute a starting point for comparisons of results against standards. Baseline data for each Accountability Pillar measure are established by averaging each jurisdiction’s results across the three years to create a jurisdiction three-year average. The three years that form the baseline for calculating standards differ among measure types, depending on data availability:

- For student achievement measures (i.e., Provincial Achievement tests and Diploma Exams), the baseline three-year average uses data from school years 2001/02, 2002/03, and 2003/04.

- For the student outcome measures (dropout, diploma exam participation, high school completion, post-secondary transition and Rutherford Scholarship eligibility rates), the baseline three-year average uses data from the 2000/01, 2001/02 and 2002/03 school years.
- For survey measures, the baseline three-year average uses results from 2003/04, 2004/05 and 2005/06.

Improvement Evaluation: The improvement evaluation focuses on improvement over time. Improvement is evaluated by comparing the jurisdiction's current result against the jurisdiction's previous three-year average using chi-square. (Chi square is a statistical test to determine the probability that there is no significant difference between an observed outcome and the expected outcome. In the case of the Accountability Pillar improvement evaluation, the chi square test is used to determine the probability that there is no significant difference between a jurisdiction's current result on a measure and its prior three-year average for that measure.) The improvement evaluation results in one of the following five improvement levels: Improved Significantly, Improved, Maintained, Declined, Declined Significantly.

Overall Measure Evaluation: Once the improvement and achievement levels have been calculated for a measure, an overall measure evaluation is calculated, which reflects both the achievement evaluation and the improvement evaluation. The overall measure evaluation is reported on a five point scale: Excellent, Good, Acceptable, Issue, Concern.

Category Evaluation: For each category of Accountability Pillar measures, the overall evaluations for each measure within that group are averaged to provide an evaluation for that category. The averaging is done by assigning the following numbers to the overall evaluation for each measure: Excellent: 2; Good: 1; Acceptable: 0; Issue: -1, and Concern: -2. These values are averaged and rounded to the nearest whole number. This result is then compared with the above list of assigned numerical values for each of the five evaluation ratings to determine the evaluation for the category.

Improvement/Decline: Improvement or decline for an Accountability Pillar measure is determined by comparing the current result against the previous three-year average using the chi-square test of statistical significance. Using the chi-square test:

- an **improvement or decline** occurs when the current result is at least one standard deviation above or below the previous three-year average, but less than two standard deviations.
- a **significant improvement or decline** (at the 5% level of confidence, or nineteen times out of twenty) occurs when the current result is approximately two or more standard deviations above or below the previous three-year average.

Target: Targets related to achievement standards are set for each year of the plan when the evaluation of results for a measure is “Issue” or “Concern”. These targets for Accountability Pillar measures:

- have a higher numerical value each year than current result (except for dropout rates, where a lower result shows improvement)
- show reasonable progress toward or move into the next higher achievement standard over the three years.

Making gains over time toward the next achievement level or attaining it will be reflected in the improvement evaluation as well. At minimum the improvement evaluation would be “Maintained,” and could be “Improved” or “Improved Significantly.”



References

Source material for this guide

- Alberta Education. *Funding Manual for School Authorities*.
<http://education.gov.ab.ca/funding/FundingManual>
- Alberta Education (2003). *K-12 Learning System Policy, Regulations and Forms Manual*.
<http://www.education.gov.ab.ca/educationguide/pol-plan/polregs/toc.asp>
- Alberta Education. *Standards for Special Education* (amended June 2004). http://www.education.gov.ab.ca/k_12/specialneeds/ (then select the publication title from the list).
- Alberta Finance (1998). *Results-Oriented Government: A Guide to Strategic Planning and Performance Measurement in the Public Sector* (September 28, 1998). <http://www.finance.gov.ab.ca/> (Select "Publications and Forms", then "Performance Measurement", then "Other Publications").
- Alberta Finance (Rick Goodkey and Ken Ogata) (1998). *Redefining Government Performance* (July 16, 1998).
<http://www.finance.gov.ab.ca/> Select "Publications and Forms", then "Performance Measurement", then "Other Publications").
- Auditor General Alberta (2004). *Accountability in the Learning Sector* (January 9, 2004). <http://www.oag.ab.ca> (Select "The Reading Room", then the publication title under "Other Documents").
- Auditor General Alberta (1997). *Government Accountability* (February, 1997). <http://oag.ab.ca> (Select "The Reading Room", then the publication title under "Other Documents").
- Government Accountability Act*, Revised Statutes of Alberta, 2000, Chapter G-7 (2003) <http://www.qp.gov.ab.ca/catalogue/>
- School Act*, Revised Statutes of Alberta, 2000, Chapter S-3 (2005).
<http://www.qp.gov.ab.ca/catalogue/>

LIBRARY AND ARCHIVES CANADA
Bibliothèque et Archives Canada



3 3286 53774738 4